A GUIDE TO CREATING A
NEIGHBORHOOD INFORMATION EXCHANGE:

BUILDING COMMUNITIES BY CONNECTING
LOCAL SKILLS AND KNOWLEDGE

A Community Building Workbook
from
The Asset-Based Community Development Institute
Northwestern University
Evanston, Illinois

Deborah Puntenney, Research Associate
John P. Kretzmann and John L. McKnight, Co-directors

Table of Contents

CHAPTER ONE

INTRODUCTION

This guide shares a process that was developed by one community organization as it discovered how to tap some of the unused and underutilized resources existing in its community. It explains a simple, inexpensive way for other community groups to make the same discovery, and to make these untapped local resources available to all members of the community. The original organization, founded in 1971, was called The Learning Exchange (TLE). TLE provided both a mechanism for the exchange of skills among individuals living in metropolitan Chicago and educational materials for other groups interested in the same sort of community venture. The Learning Exchange was an independent, not-for-profit, educational and recreational listing and referral service available to institutions, organizations, and people of all ages, races, socio-economic levels, and educational backgrounds. It was designed to facilitate an individual capacity exchange so that knowledge and new ideas could be shared among community members.

With this revised guide, we carry on the tradition of TLE to periodically update information about how to organize such a capacity-sharing project. Although The Learning Exchange organization no longer exists, the ideas that formed the basis for its design are as worthwhile today as they were 25 years ago. There is one major difference, however, between the model provided by the original Learning Exchange and the model we will present here.

The Learning Exchange was a formal, not-for-profit organization that was formed for the specific purpose of managing a listing and referral service for the residents of a large metropolitan area. TLE had employees, offices, telephone systems, and computer systems; in other words, more resources than many small community groups can manage without a great deal of outside assistance. However, the basic Learning Exchange model can be modified to suit the financial and human resources of any community group, no matter how large or small. This guide presents a simple set of steps that describe how a small organization can develop a simplified and less formal version of a capacity listing and referral service using volunteers, donated space, and a minimal budget. Groups with extensive resources can easily translate this simple model into a more complex version by expanding or increasing the sophistication of any or all parts of the project.

In the Appendices of this guide, we have made some notes about the kinds of issues you will encounter if you want to operate a larger and more formal version than we outline here. Throughout this guide, watch for the symbol ** to indicate that additional information is available in the Appendices.

Following a brief history and description of the original organization, the basic steps for designing and operating a local capacity listing and referral service are presented in the remainder of this guide. We have included examples of how many of the steps may be

interpreted and carried out. We encourage community groups who are interested in establishing such an exchange to be creative, and to modify our suggestions and examples to suit their specific needs.

HISTORY OF THE LEARNING EXCHANGE

During the winter of 1970-71 a series of educational seminars took place at Ivan Illich's Center for Intercultural Documentation (CIDOC) in Cuernavaca, Mexico. Innovative educators from all over the western hemisphere participated in the sessions, including Denis Detzel, Edgar Friedenberg, Paul Goodman, Ivan Illich, and Everett Reimer. One of the major purposes of the seminars was to brainstorm about creative educational models that were viable, inexpensive, and readily accessible to rich and poor alike.

Denis Detzel brought the idea of an educational/recreational listing and referral service back to Northwestern University and shared it with students, faculty, and members of the Evanston community who soon transformed the idea into the organization called The Learning Exchange.

Even though The Learning Exchange was established independently, a very small amount of seed money for initiating the project was obtained from a university source. With this donation, TLE printed 1,000 leaflets describing the service and purchased a supply of 3x5 index cards to start an information bank. A small office and a telephone were generously contributed by a local Volunteer Bureau for four hours per evening. During the first few months of operation, all the printed leaflets were distributed, posters were displayed, radio stations broadcast public service announcements, members of the volunteer staff were interviewed on radio and television shows, and articles about TLE appeared in a variety of daily and weekly newspapers in the Chicago area. By the end of the first year, 1,000 people were registered.

GOALS OF THE LEARNING EXCHANGE

The Learning Exchange was established in order to accomplish the following five specific goals:

- To develop an economical and efficient vehicle to collect, organize, and make accessible information about educational and recreational resources and opportunities in metropolitan Chicago.

- To encourage individual citizens to assume the responsibility to teach, learn, and share their interests with others.

- To assist public and private institutions in the development of their educational and recreational programs.

- To become a self-supporting organization through client memberships and contributions.

- To offer to other cities a working example of how the educational and recreational resources of a community can be better utilized.

HOW A LOCAL CAPACITY LISTING AND REFERRAL SERVICE WORKS

A local capacity listing and referral service connects community people so that they can exchange skills and abilities, and develop relationships in which they engage in various kinds of activities together. Such a service functions as a clearinghouse that introduces people to other people based on information that has been gathered and stored for this purpose. The aim of the service is to increase connections among community people. These new relationships can develop out of shared interests, corresponding needs and abilities, or the desire to teach or to learn.

The most simple local capacity listing and referral service consists of a method of gathering information; an information input, storage, and retrieval system; an individual who manages the information; and some method of public access to the information. To use the service, area residents who want to teach, learn, or share their interests simply contact the organization and indicate the kind of educational or recreational relationship they would like to develop. This information is recorded, categorized, and stored in the information bank. The information is then used to refer individuals to one another: teachers are referred to learners and learners are referred to teachers; people with similar interests are referred to each other.

After referral, participants assume the responsibility of creating their own arrangements with one another according to their own needs, abilities, and convenience. They determine independently when and where to meet, the length of their meeting, the materials to be used, and whether or not there will be a fee exchange.

The teachers who participate in a listing and referral service are independent agents and should not be paid by your organization for their services. Teachers may charge the learners to whom they are referred a fee or they may teach without charge. Often teachers and learners develop some sort of a mutually agreeable exchange arrangement, for example, "You teach me French and I'll teach you guitar," or "You teach me French and I'll weed your garden."

The local capacity listing and referral service can be used in a variety of ways by community residents. The following list provides some examples of the kinds of ways the idea is being used:

- Participants find tutors and teachers in foreign languages, arts and crafts, musical instruments, specific skills, plus scores of academic subjects and other kinds of educational and recreational activities.

- Individual citizens who have acquired skills, talents, and knowledge experience the satisfaction of sharing their "know-how" with interested learners in and around their neighborhoods.

- Handicapped people and senior citizens who cannot attend formal classes find teachers willing to visit their homes.

- Persons who are preparing for GED, ESL, and other examinations find tutors willing to assist them.

- Parents find tutors for their children who might be having difficulty with a particular subject or who want to learn a subject not offered by their school.

- Senior citizens feel a sense of worth and usefulness through teaching the skills they have acquired over the course of their lifetime.

- People find recreational partners and competitors, as well as teachers, in numerous games and sports.

- College students locate experts in business, industry, government, and social services who are willing to enter into mentoring relationships.

- Libraries, park districts, and community colleges find resource people to expand their programs and publicize their classes, workshops, and activities through their local capacity listing and referral service.

- Program chairpersons of church, civic, and service organizations find guest speakers for their meetings.

The people who participate in a local capacity listing and referral service come from all walks of life and most of them do not have formal teaching credentials. The people involved in developing such a service generally agree that a teaching certificate is not the only indicator of teaching competence. In the experience of the original Learning Exchange, less than 7% of the adult population were certified teachers, yet the other 93% possessed a great deal of "know-how" that they were willing to share with others. A local capacity listing and referral service affords people the opportunity to share, even if they don't have a college degree or a teaching certificate.

Since most capacity listing and referral services do not provide meeting space for participants, interactions among participants take place in the homes of the individuals or in public places. A number of community spaces, including libraries, community centers, parks, churches, business offices, and even restaurants may also be available as meeting places for program participants.

CHAPTER TWO

INITIAL STEPS

As with the establishment of any type of organization, community service, or program, there are a number of decisions you'll have to make as well as tasks you'll have to perform prior to the founding of your listing and referral service. This chapter outlines, in rough chronological order, the initial steps necessary for establishing such a service.

Please keep in mind that the information in this guide applies to the establishment of a very small, independent, informal service. If you intend to set up your service formally, on a for-profit or not-for-profit basis, or if you intend to establish a very large organization, you should refer to the Appendix for suggestions, and seek legal advice in order to make the necessary alterations that would apply to your program. Also, if you intend to operate your program formally as part of an existing organization or institution, you'll want to consult the administrative and legal staff of your sponsoring agency so you can determine the best way to proceed. **

IDENTIFYING A CORE GROUP OF VOLUNTEERS

The deeper you get into your program, the more you'll appreciate the complexities of developing and operating a listing and referral service. Although it can be done by almost anyone, it is not as simple as it might appear. You will need to have a core group of dedicated people in order to make the program a success. As you'll see in the later sections of this book, you'll have to find people with some skills and abilities in the following areas: record-keeping, advertising, fundraising, writing, and graphic design. The individuals you include need not have formal training or experience in these areas, but they should have the ability, interest, and initiative necessary to learn the basics of the area in which they will contribute.

The easiest way to get started is by using a volunteer staff. Although your organization may eventually want to shift from a volunteer staff to a paid staff, we recommend starting small, basing the size of your operation on the ability of local volunteers to manage the personnel requirements of the capacity listing and referral service. If your service begins to serve more people than your volunteers can handle, the need for a tightly knit, highly systematized internal structure may become important. But we will begin with the steps for organizing a small, easily managed service.

DESIGNING YOUR GAME PLAN

After you have identified a core group of people to work on your project, you will want to establish a preliminary game plan.

• First, establish your local capacity listing and referral service goals.

Goals can sometimes be very general, for example, "Our goal is to encourage neighborhood residents to share their individual capacities with one another." This is a wonderful goal, but in designing your game plan, try to make this goal more specific. For example, "Our goal is to enroll 50 individuals and families in our listing and referral service, and create 20 new sharing relationships among these members." By making the general goal concrete, you are able to move more easily to the next step.

• Next, outline the objectives you must achieve in order to reach your goals.

If you have established concrete goals, you should be able to break down the actual work that needs to get done in order to meet those goals with relative ease. Using the concrete goal identified in the previous paragraph as an example, the objectives that must be achieved to meet that goal would include:
  • Preparing informational and promotional materials.
  • Distributing informational and promotional materials.
  • Establishing a record-keeping system.
  • Establishing a telephone or other contact system.
  • Assigning specific responsibilities to volunteers and monitoring their activities.
  • Enrolling interested individuals.
  • Becoming familiar with the capacities of your members.
  • Providing information or introductions among community members with similar interests.

• Third, define a set of strategies and timelines for achieving the objectives.

Since your objectives encompass quite a bit of work, you will need to organize a time line that realistically allows for all the steps to be completed. You must also strategize in order to make the best and most effective use of the time your volunteers can contribute.

• Finally, construct some type of simple evaluation so you can gauge your effectiveness in meeting your objectives.

Your evaluation does not need to be complex, but you do want to know if satisfactory sharing exchanges or relationships were developed as a result of the information or introduction you provided.

As you read through the following chapters, you'll get a more complete idea of the kinds of objectives and strategies you'll need to formulate in order to develop a successful listing and referral service.

CHOOSING A NAME FOR YOUR ORGANIZATION

One important decision you'll have to make in establishing a local capacity listing and referral service is determining an appropriate name for your program. Be creative when you think about what name you would like to use. You can start by having a name-finding brainstorming session with your core group of volunteers. List all the possible names your group can think of, and ask some of the following questions in order to sort out the better names:

• Is the name descriptive of the service?

• Is the name confusing or vague?

• Will the name attract interest and attention?

• How easy would it be to communicate about your listing and referral

service using the name?

• Does the name satisfy each of the members of your core group?

• Is there anyone who might be offended by this name?

Please note that you should *not* call yourself "The Learning Exchange," use "Learning Exchange" in your name, or refer to your organization as "a learning exchange." THE LEARNING EXCHANGE, TLE, and the TLE Logo are trademarks of THE LEARNING EXCHANGE and the use of any of these without written authorization is prohibited. Moreover, the original organization found that the name is a poor one as it does not convey an accurate and complete picture of all the other things a listing and referral service can do. So, be creative, and try to identify your program with as much accuracy and flair as possible.

BASE OF OPERATION

A local capacity listing and referral service does not require a large office in order to serve the people in the neighborhood. You'll need some kind of office space for your information systems, telephone, and telephone resource volunteers. If possible, you should also have some room for storage and a table where several volunteers can work together on such tasks as fundraising, publicity, planning, etc.

Many listing and referral services find space in churches for establishing their base of operation. When searching for a possible location, you may want to contact pastors in your neighborhood to see if they might have some space available. Using such a community resource is a good idea if it is a possibility, as your location will probably be central, and you may have access to a telephone and other basic office equipment.

You should not try to provide meeting space for individual community members who have met each other through your service. Trying to do this would greatly increase the amount of space

you need, and would require a substantial amount of volunteer time to coordinate and schedule the activities. In addition, most people are creative and resourceful enough to find existing, often underutilized, space in which to meet. Most communities have all sorts of potential meeting places–in homes, apartments, churches, libraries, community centers, business offices, parks, restaurants, etc.

TELEPHONE INSTALLATION

After you have a location, you'll need to have access to at least one telephone. If you have made arrangements for the use of space with an organization such as a local church, they may allow you to use their telephone equipment. Make sure, however, that they understand you will publicize the telephone number in your promotional materials.

If you are installing a telephone and ordering a telephone number, try to obtain a number that is easy to remember or that spells an appropriate word or phrase.   For example, 666-6000 is easier to remember than 653-8724; and the numbers 266-6328 spell "CONNECT" when dialed according to the corresponding letters on the telephone pad.

CONCLUSION

Completing the steps outlined in this chapter will provide you with the basics that you need to build a capacity listing and referral service for your community. The careful consideration you give to such important items as the people you choose to help with the project, the name you select, and the game plan you develop will have an influence on the way in which your program evolves.

The next chapter on information systems explains a simple card file method of tracking your capacity listing and referral participants and the connections they make with other people in the community.

CHAPTER THREE

INFORMATION SYSTEMS

The core of an effective capacity listing and referral service is the information system used for data input, storage, and retrieval. The quality of the service is largely a function of the accuracy, completeness, and accessibility of information stored in the data base. The information system we will describe in this chapter is simple and basic; really very little more than a set of file boxes filled with 3x5 index cards. Some listing and referral services have moved beyond this simple system to more sophisticated computerized systems, but the very basic information system we describe here works well for small, local programs that are just starting out. **

The five components of the basic information system that we describe in this chapter include:

• Master Card File (active and inactive)

• Teacher Card File

• Learner Card File

• Interest Match Card File

• Feedback Card File

Each card is completed as an individual community member goes through the process of contacting your capacity listing and referral service, obtaining referrals, forming a new capacity-sharing relationship, and getting back to you about what the referral produced.

At this point we want to make one very important suggestion. Please use different colored cards for each of the five system components! If all of the cards in your record-keeping system are the same color, it will be difficult to tell at a glance which kind of card you are working with. Using different colored cards makes it a simple matter to know where things should be filed and which part of the file system is in use at all times.

The remainder of this chapter explains in detail how to use each of the components in the card-filing system.

COMPLETING A MASTER CARD

When an individual first makes contact with your capacity listing and referral service, the volunteer begins a Master Card which will start the record of contact for this person. The volunteer should complete as much of the Master Card as possible at the time of the initial contact. This first contact will most likely follow one of two scenarios:

- Scenario #1 - The individual will simply be asking for information about the program, or

- Scenario #2 - The individual will ask for information and be prepared to register or become a member at the same time.

If the individual is calling only for information, the following steps should be followed in filling in information on the Master Card (example on next page):

- All of the personal information categories, including the name, address, and telephone numbers of the individual should be completed.

- The date of the initial contact should be entered in the space titled "Init." in the top right-hand corner of the Master Card.

- The individual should be asked where he or she heard about the program (this information will help you determine the effectiveness of your publicity efforts).

- The individual should be asked what times of day or evening are best for reaching him or her; this information should be entered in the appropriate spaces.

- The volunteer who is handling the contact should enter their name at the end of the Master Card.

- The last three categories: Teacher Cards, Learner Cards, and Interest Cards should be left blank at this time.

A preliminary information-seeking contact may be either in person or on the telephone. In either case, once the basic information on the Master Card has been completed, an information packet should either be given to, or mailed to the interested individual. The information packet can be very simple but should include at the very least a description of the service, how it operates, and a registration form stamped with the date of the contact. The Master Card is then placed temporarily in the Inactive Master Card File. The card stays in this file until the individual returns the registration form and provides information for their teaching, learning, and interest cards.

SAMPLE MASTER CARD

<div>

MASTER CARD

Name: *John Harris*   Init: *2/2/97*

Address: *27 Center Street*   Reg: *3/5/97*

                                                     Mem:_____

City: *Morrisville*   State: *IL*   Zip: *00000*

Home Ph: *444-4444*   Work Ph: *444-5555*

Where Heard: *Flyer posted on door of home*

Best Time: *Evenings 7-9*   Best Time: *Days T-W 9-12*

Teacher Cards	Learner Cards	Interest Cards
Welding Spanish	*Tennis*	

Staff Volunteer: *Betty Jones*

</div>

When an individual makes a second contact with your capacity listing and referral service, either by returning the registration and membership form or in a face-to-face meeting, the volunteer completes the registration process by filling out a Teacher Card, Learner Card, and/or Interest Card, and indicating on the Master Card that these cards are now complete. If the complete registration process is taking place at the first contact, the volunteer should simply proceed with the following steps:

• If the registration is for a registered program user, the volunteer should enter the date of registration in the space titled "Reg." If the registration is for a program member, the volunteer should enter the date of registration in the space titled "Mem.".

• If the individual wants to teach a subject or learn a subject, the volunteer should complete a Teacher Card or Learner Card for this person, and indicate that this has been done by noting the topics in the appropriate space or spaces on the Master Card (the following sections describe in detail how to fill out each of these record cards).

• If the individual wants to be listed as interested in an activity, the volunteer should complete an Interest Card, and indicate that this has been done by noting the interest in this space on the Master Card (the following sections describe in detail how to fill out this record card).

• Once the individual has indicated how he or she wants to be listed–as a Teacher, Learner, or Interested party–and the appropriate record-keeping cards have been completed, the registration process is complete.

We should make note of one issue at this point. If you intend to charge a small registration fee or to offer voluntary memberships to your participants to help cover the cost of materials, you should include this payment as part of the registration process. Thus, a telephone registrant would still need to submit payment of the fee prior to being considered formally registered. Once registration is complete, the Master Card for this individual should be transferred to the Active Master Card File, and the Teacher, Learner, and Interest Cards filed in the appropriate files. The best way to file these cards is to organize each card file alphabetically on the basis of last names.

At any time during their participation, individuals should be able to make changes in their records with your capacity listing and referral service. As this happens, obsolete cards may be transferred to inactive or dead files, while current cards are maintained in the active files. The Master Card for any individual should remain in the active file unless the person no longer wishes to participate.

COMPLETING A TEACHER MATCH CARD

If an individual wants to teach a subject, for example, welding, the volunteer should fill out a Teacher Card for this person. Following these steps will help to assure that your volunteers are able to quickly locate cards for appropriate matches.

- Enter the topic the individual is interested in teaching. In this example, the individual wants to teach welding, so "welding" should be entered on the first line of the Teacher Card. If there is another subject title that might apply to the offering, be sure to make out a cross-reference card. For example, if the individual were registering to teach Judo, you should have a plain index card on file under Self-Defense that states, "See listings for Judo." You might want to consult a librarian for hints on cross-referencing.

- Enter any descriptive information on the next lines, along with a notation of the competency of the Teacher and the level of expertise that is offered. This information should include how and where the individual gained the knowledge, plus any information he or she would like to have conveyed to prospective learners.

- Note that sometimes an individual may indicate a topic with a complicated name or a specialty designation. In this case, enter a consistent title for the general topic that is offered, and use the descriptive box to indicate further distinctions. For example, if the subject is oxy-acetylene welding specifically, the volunteer should enter "welding" on the topic line, and enter the "oxy-acetylene" designation on the descriptive line. Because the Teacher Cards are filed alphabetically, this information entry method will simplify your ability to locate appropriate matches.

- Enter the name and telephone number of the individual who is offering to teach, as well as the best times to reach this person. A street address is not needed on this card since this information is not given to prospective learners unless teachers specifically indicate that they want their address given out.

SAMPLE TEACHER CARD

<div style="border:1px solid black;">

TEACHER CARD

Topic: *Welding*

Description, Competency, & Level: *Certified welder will teach*

oxy-acetylene welding to beginning and intermediate learners

Name: *John Harris*

Telephone: *444-4444*

Best Times to Call: *Evenings 7-9 or Days T-W 9-12*

Date: *3/5/97*

Fee: Y   N   M   Willing to Travel: Y   N
$8 per hour plus materials   *Anywhere in Morrisville*

Staff Volunteer: *Betty Jones*

</div>

- Enter the date on which the Teacher Card was filled out.

- Circle the appropriate letter (Y = Yes, N = No, M = Maybe) to indicate whether or not the individual intends to charge a fee. Teachers can charge by the hour, use a sliding scale, or negotiate a mutually agreeable fee arrangement with learners. Write in any specific details about fees.

- Circle the appropriate letter (Y = Yes, N = No) to indicate whether or not the individual is willing to travel. This will probably not be an issue for most community-based programs as most participants will live in a nearby area. Write in any specific details about travel.

- The volunteer who is handling the contact should enter his or her name at the end of the Teacher Card.

COMPLETING A LEARNER MATCH CARD

When the individual's Teacher Card is complete, the volunteer should ask if the person is also interested in being listed as a potential learner. If there is a topic the individual is interested in learning, for example, Spanish, the volunteer should first complete a Learner Card for the individual, and then provide any referrals for people who are listed as Teachers for the subject. A Learner Card may also be completed at any time a member of the listing and referral service indicates a desire to be listed as a learner.

- Enter the topic the individual is interested in learning. In this example, the individual wants to learn Spanish, so "Spanish" should be entered on the first line of the Learner Card. If there is another subject title that might apply to the offering, be sure to make out a cross-reference card.

- Enter any descriptive information on the next lines, along with a notation of the level of expertise that is required. This information should include any information the learner would like to have conveyed to prospective teachers, for example "Going to Mexico in September and would like to learn from a native Spanish speaker."

SAMPLE LEARNER CARD

LEARNER CARD

Topic: *Spanish*

Description, Competency, & Level: *Going to Mexico in September*

and would like to learn from a native Spanish speaker

Name: *John Harris*

Telephone: *444-4444*

Best Times to Call: *Evenings 7-9 or Days T-W 9-12*

Date: *3/5/97*

Fee: Y   N   M   Willing to Travel: Y   N
$8 per hour or exchange   *Anywhere in Morrisville*

Staff Volunteer: *Betty Jones*

- Note that an individual may indicate a topic with a complicated name or a specialty designation. In this case, enter a consistent title for the general topic that is desired, and use the descriptive box to indicate further distinctions. For example, if the learner specifically wants to learn how to write in Spanish, the volunteer should enter "Spanish" on the topic line, and enter "Already speaks Spanish but wants to learn to write."

- Enter the name and telephone number of the individual who is requesting a teacher, as well as the best times to reach this person. A street address is not needed on this card since this information is not given to prospective teachers unless learners specifically indicate that they want their address given out.

- Enter the date on which the Learner Card was filled out.

- Circle the appropriate letter (Y = Yes, N = No, M = Maybe) to indicate whether or not the individual is willing to pay a fee. Learners may be willing to pay by the hour or negotiate a mutually agreeable fee arrangement with teachers.

- The volunteer who is handling the contact should enter his or her name at the end of the Learner Card.

COMPLETING AN INTEREST MATCH CARD

When the individual's Teacher and Learner Cards are complete, the volunteer should ask if the person is also interested in being listed as a potential partner for recreational or other kinds of activities. If there is an activity in which the individual is interested, for example, playing tennis, the volunteer should first complete an Interest Card for the individual, and then provide any referrals for people who are also listed as interested in the activity. An Interest Card may also be completed at any time a member of the listing and referral service indicates the wish to be listed as interested in an activity.

- Enter the activity in which the individual is interested. In this example, the individual is interested in playing tennis, so "Tennis" should be entered on the first line of the Interest Card.

- Enter any descriptive information on the next lines, including the competency of the individual as a potential partner, and a notation of the level of expertise that is desired of the match. This information should include any information the learner would like to have conveyed to prospective matches, for example "Looking for tennis partners who play at the intermediate level."

- Note that an individual may indicate an activity with a complicated name or a specialty designation. In this case, enter a consistent title for the general activity, and use the descriptive box to indicate further distinctions. For example, if the individual wants a partner for indoor tennis specifically, the volunteer should enter "Tennis" on the topic line, and enter "Only wants to play indoor tennis" on the descriptive line. Because the Learner Cards are filed alphabetically, this information entry method will simplify your ability to locate appropriate matches.

- Enter the name and telephone number of the individual who is requesting an interest match, as well as the best times to reach this person. A street address is not needed on this card since this information is not given to prospective partners unless individuals specifically indicate that they want their address given out.

- Enter the date on which the Interest Card was filled out.

- Circle the appropriate letter (Y = Yes, N = No, M = Maybe) to indicate whether or not the individual is willing to pay a fee related to the activity. Partners may be willing to share fees for participation in the activity, for example, for tennis court time.

SAMPLE INTEREST CARD

```
INTEREST CARD

Topic:    Tennis

Description, Competency, & Level:      Looking for tennis partners

who play at the intermediate level

Name:    John Harris

Telephone:    444-4444

Best Times to Call:    Evenings 7-9 or Days T-W 9-12

Date:    3/5/97

Fee:    Y    N    M                Willing to Travel:    Y    N
For court time Anywhere in Morrisville

Staff Volunteer:    Betty Jones
```

•   The volunteer who is handling the contact should enter his or her name at the end of the Interest Card.

Note that the Teacher Card, the Learner Card, and the Interest Card are almost identical to one another. The only difference is the designation at the top of the card and the information that is listed upon the card in the spaces provided. For this reason our recommendation that you use different colored cards for each purpose is especially important.

COMPLETING THE FEEDBACK CARDS

Any time an individual calls for a referral, the volunteer needs to record the information that is given to the caller and plan a time to check back with the individual to find out how the referrals worked out. Having a system for checking back with people who have used the capacity listing and referral service will help you to maintain an up-to-date filing system, to weed out obsolete or out-of date listings, and to remove listings that have caused problems for users of the system.

Ideally, each individual will call you back and provide the feedback without prompting. Sometimes, however, people forget to call, so we suggest using a two-part feedback system that provides a reminder for calling people who have obtained a referral but who haven't reported back about their experience.

The additional set of cards that is used for a simple feedback system includes:

- Feedback Card A, which is started when an individual calls your program for a Teaching, Learning, or Interest referral, and records the names of the matches your volunteer offers. The card is completed when an individual calls back to report on the success of each referral. Feedback Card A is attached to, and stored along with the Master Card of each individual.

- Feedback Card B, which is simply a reminder card that is used to prompt volunteers to call individuals who obtained referrals, in order to get feedback about the success of the experience. These cards are stored separately by date.

Feedback Card A is somewhat more complicated to fill out than the other cards in the system because your volunteers will use codes to indicate some answers. The following steps should be followed when completing this card.

- Enter the name and telephone number of the individual who is offering to teach, as well as the best times to reach this person.

- Enter the topic of the referral and name of the individual being referred in the space titled "Topic/Name," for example: Welding/J Peterson.

- Enter the code for source of the referral (listed beneath the box). By source of referral, we mean, are you providing the name from a Teacher Card, a Learner Card, or an Interest Card? Enter the code for the appropriate response. So, for example, in this box on the sample Feedback Card A on the next page, J Peterson is being referred to John Harris for welding because Mr. Harris has indicated that he can teach welding, and Mr. Peterson's Learner Card indicates that he would like to learn welding. So the Feedback Card A for John Harris indicates that a referral was made to him from Mr. Peterson's Learner Card using the code "L." (A corresponding entry "welding/J Harris" would appear on Mr. Peterson's Feedback Card A, indicating that the referral came from a Teacher Card).

- Enter the description and code for all referrals being given at the time of the call.

- Enter the date on which Feedback Card A was filled out.

- Enter a date about two weeks after the date on which the referral is being given. This is the date on which a follow-up call should be made to John Harris to request feedback if Mr. Harris has not already called to provide it.

- The volunteer who is handling the contact should enter his or her name at the end of the Interest Card.

Completing the card once the feedback is received:

When the individual contacts your capacity listing and referral service to report about the results of the referral (or when you contact them), Feedback Card A should be completed.

• Enter the code for the result of the referral (listed beneath the box). By result of referral, we mean a basic assessment of whether or not the referral was a success. For example, in this box on the sample Feedback Card A on the next page, John Harris has reported a successful result from the referral to J. Peterson. The code "S" is entered in the result box, and a brief comment is entered in the comments box, "Meeting twice a week." (If Mr. Peterson also reported a successful outcome from the referral, a corresponding entry would appear on Mr. Peterson's Feedback Card A.)

• An entry is made for each of the referrals originally given to John Harris. In this example, John Harris also received another referral for welding, but that referral produced unsatisfactory results: Mr. Smith's telephone had been disconnected. John Harris also received a referral for a Spanish teacher, which also resulted in a satisfactory match. The request for an interest match made by Mr. Harris has not yet produced any result.

• Feedback Card A should be attached to the Master Card and filed in the Active Master Card File.

SAMPLE FEEDBACK CARD A

FEEDBACK CARD A

Callback Date

Name: *John Harris*   1st 7/15/97

Telephone: *444-4444*   2nd

Best Times to Call: *Evenings 7-9 or Days T-W 9-12*   3rd

Topic/Name:	Card:	Result:	Comments:
Welding/ J Peterson	L	S	Meeting twice a week
Welding/T Smith	L	U	Telephone disconnected
Spanish/M Jones	T	S	Meeting once a week
Tennis/G Havers	I		

Card Codes: T=Teacher/L=Learner/I=Interest
Results Codes: S=Successful/U=Unsuccessful/O=Other

Date:

Staff Volunteer: *Betty Jones*

The second component of the two-part Feedback Card system, is Feedback Card B. Whenever an individual contacts your capacity listing and referral service, an important step that your volunteer should remember is to request a return call in order to provide feedback about the success of the match. Many people will remember to call and let you know how things are going, but sometimes this does not occur. For this reason, a second card is maintained so that your volunteer can contact the individual several weeks after the referral was given, in order to ask for feedback.

Feedback Card B is a simple card, and records only the individual's name, telephone number, best times to call, and the appropriate date to call, based on when the individual received a referral.

• Enter the name and telephone number of the individual who is receiving the referral, as well as the best times to reach this person.

• Enter the date that a follow-up call would be appropriate, usually about two weeks after the referral is given.

SAMPLE FEEDBACK CARD B

FEEDBACK CARD B

Callback Date

Name: *John Harris*   1 *7/15/97*

          2 _____

          3 _____

Telephone:*444-4444*

Best Times to Call: *Evenings 7-9 or Days T-W 9-12*

Staff Volunteer: *Betty Jones*

• The volunteer who is handling the contact should enter his or her name at the end of Feedback Card B.

- Feedback Card B should be filed *by date* in a separate card file. Volunteers should call individuals who have a Feedback Card B filed on any given date if they have not already received a feedback telephone call from the individual. When the call is made, the volunteer should complete Feedback Card A as described in the earlier section, and temporarily attach Feedback Card B to Feedback Card A and the Master Card to await another set of referrals.

GOING THROUGH THE PROCESS

Once the individual is completely registered, all of the cards should be filed in the appropriate master files:

- File Master Cards in the Active Master Card File alphabetically by the last name of the registered individual.

- File Teacher Cards in the Active Teacher Card File alphabetically by the topic the individual wants to teach.

- File Learner Cards in the Active Learner Card File alphabetically by the topic the individual wants to learn.

- File Interest Cards in the Active Interest Card File alphabetically by the activity for which the individual is seeking a partner.

- File Feedback Cards in two ways: Feedback Card A should be filed along with the individual's Master Card in the Active Master Card file; Feedback Card B should be filed by date in the Callback File.

At any time a registered member of your capacity listing and referral service contacts you about a desired teaching experience, learning experience, or activity interest, you will be able to quickly locate other individuals who are a good match. The process that your volunteers will go through each time they are contacted is very easy as long as your record cards are up to date and appropriately filed.

If individuals call to request information about learning, in other words to list themselves as a potential student and to obtain a referral to people who might be able to teach them a specific topic:

- The volunteer should complete a Learner Card for the individual.

- The volunteer should then look for listings under the requested subject. For example, the caller is interested in learning welding, so the volunteer looks in the Active Teacher Card File under "Welding."

- The volunteer may find several cards, among them one for Mr. John Harris, who indicates that he will teach beginning and intermediate learners oxy-acetylene welding.

- The volunteer explains to the caller the specific conditions that Mr. Harris and any other teachers of welding have listed on their Teacher Cards, for example, the requested fees, and the distances they are willing to travel.

- The volunteer gives the name and telephone number of Mr. Harris and any other appropriate teachers of welding to the caller.

- The volunteer asks the caller to notify the listing and referral service of the final outcome of the referral (see next section on Feedback Card).

- The volunteer notes on the caller's Master Card that the individual now has a Learner Card under the "Welding" listing.

If individuals call to provide information about something they are able to teach, in other words, to list themselves as a teacher and obtain a referral to people who might want to learn a specific topic:

- The volunteer should complete a Teacher Card for the individual.

- The volunteer should look for listings under the requested subject. For example, the caller is interested in teaching Spanish, so the volunteer looks in the Active Learner Card File under "Spanish."

- The volunteer may find several cards, among them one for Mr. John Harris, who indicates that he is interested in learning Spanish for an anticipated trip to Mexico in September.

- The volunteer explains to the caller the specific conditions that Mr. Harris and other potential students have listed on their Learner Cards, for example, the willingness to pay fees, and the distances they are willing to travel.

- The volunteer gives the name and telephone number of Mr. Harris and any other appropriate learners of Spanish to the caller.

- The volunteer asks the caller to notify the listing and referral service of the final outcome of the referral (see next section on Feedback Card).

- The volunteer notes on the caller's Master Card that the individual now has a Teacher Card under the "Spanish" listing.

If individuals call to request information about an activity for which they would like to find a partner, in other words, to list themselves as interested in an activity and obtain a referral to people who might want to join them:

- The volunteer should complete an Interest Card for the individual.

- The volunteer should look for listings under the requested subject. For example, the caller is interested in tennis, so the volunteer looks in the Active Interest Card File under "Tennis."

- The volunteer may find several cards, among them one for Mr. John Harris, who indicates that he is interested in finding a tennis partner who plays at the intermediate level.

- The volunteer explains to the caller the specific conditions that Mr. Harris and other potential activity partners have listed on their Interest Cards, for example, the willingness to share fees, and the distances they are willing to travel.

- The volunteer gives the name and telephone number of Mr. Harris and any other appropriate tennis partners to the caller.

- The volunteer asks the caller to notify the listing and referral service of the final outcome of the referral (see next section on Feedback Card).

- The volunteer notes on the caller's Master Card that the individual now has an Interest Card under the "Tennis" listing.

If an individual calls (or if your volunteer calls an individual) to report the status of an earlier referral, in other words, to provide feedback about the match the person was given:

- The volunteer first locates the individual's Master Card in the Active Master Card File. Attached to it should be a Feedback Card A.

- The volunteer adds the results assessment code to the appropriate box or boxes on Feedback Card A. Feedback for all referrals should be obtained if possible.

- Additional referrals are offered in the case of an unsatisfactory match or request for additional referrals.

- The volunteer follows up on any feedback indicating that the capacity listing and referral service has incorrect or obsolete information (e.g., disconnected phone numbers) in any of the Master, Teacher, Learner, and Interest Card Files.

- The volunteer files the Feedback Cards A and B with the individual's Master Card until they are completely filled. At this time, a new set of Feedback cards can be started, and the old ones filed separately, or given to someone who tabulates the responses in order to determine the effectiveness of the service.

- Note: If an individual does not call you with feedback by the callback date noted on Feedback Card B (which, as stated earlier, is about two weeks after they received the names and phone numbers of referrals), a volunteer should call this person, along with all the other clients who are due to provide feedback on that date.

All the cards remain in the Active Card Files until the individual asks that it be removed. If an individual who received a name from the listing and referral service reports that the information is incorrect or out-of-date, all of the cards for that referral are pulled temporarily until that person can be contacted to confirm the learner's feedback.

CONCLUSION

What begins as a set of simple shoe boxes containing blank 3x5 index cards will soon develop into an exciting information system that will benefit the members of your community. Depending on the size of your community, the demand for expanding the scope of the program, increasing participation, and improving the quality of the service may make it necessary for more complex systems to be developed. Whether or not to expand the service is something your organization should think about carefully. If you want to continue to operate solely on the basis of volunteer efforts, you may want to limit the size of your service. If you decide to expand, you will need to revisit the considerations for the establishment of a legal entity, and perhaps think about institutional entities with whom you might partner.

CHAPTER FOUR

PUBLICITY NETWORKS

The ultimate success of a listing and referral service is somewhat dependent upon the number of participants in the program. More people actively participating in the service leads to more resources and offerings, thus increasing the likelihood that individual learners will easily find people in and around their neighborhood who can help meet their educational and recreational needs. While we encourage you to begin small, don't make your service too small, or people will become frustrated with their inability to find someone who is a match for their expertise or interests. On the other hand, the original Learning Exchange was a very large program with many paid employees, offices, and an annual budget that your organization may not have at this time. So, the objective is to keep it manageable, while still offering matches to all registered members.

It is important to develop appropriate communication techniques for attracting people to your program. One way to reach out to residents of your own community and surrounding communities is to use various kinds of publicity networks. As you think about which networks are most appropriate for your program, remember that you do not want to attract so many people that you cannot manage the service. On the other hand, you want to reach the people in your neighborhood so that every local resident can participate. Some time and effort must be spent in developing and maintaining publicity networks. Particular attention should be given to the formulation of consistent messages appropriate for each publicity network. In this chapter, procedures for developing several different kinds of publicity networks will be outlined and principles involved in devising messages with impact will be described.

GENERAL CONSIDERATIONS

Because you are probably starting quite small, some possibilities for the promotion of your capacity listing and referral service are probably not appropriate. Although you may want to consider some of the more wide-reaching media–for example, newspapers, radio, and television stations–at a later date, if you plan to significantly expand your service, your initial publicity network should probably rely on smaller, more local sources.

Many of the potential publicity networks you may want to tap into will offer free or very inexpensive methods for delivering your message to the public, and some may be able to offer space for the operation of your program and for the capacity-sharing meetings your participants will schedule. One especially effective publicity network relies on cooperative working arrangements with the institutions, businesses, and organizations already existing in the community. As you will see throughout this chapter, developing appropriate kinds of institutional connections will enhance your ability to meet the educational and recreational needs of the people you are striving to serve.

Perhaps the most important consideration for you to keep in mind as you think about your publicity efforts is that no single method or technique will be very effective in isolation. To have a strong communication program, you'll need a comprehensive approach that places your message in a variety of places within the community. The more times your consistent message strikes people from different directions, the greater the likelihood of your motivating them to pick up their telephones to find out more about your program. Some people will call you after only one exposure to your message; others need ten or twenty exposures before they decide to make their first call.

LOCAL LIBRARY

If you have a local library, this may be a good place to promote your listing and exchange service. Many libraries provide some method of distributing materials about local activities and programs to their patrons. If you do a good job of introducing the local librarian and staff to your program, they may be willing to help you pass the word. A real advantage to using your local library to promote your service is that you will develop a relationship that can produce some great community-building results. If the library staff know about your capacity listing and referral service, they will be able to use it to:

• Gain referrals to your "community experts" who may be willing to help conduct a variety of educational programs, exhibits, and classes that may be sponsored by the library.

• Develop a unique reference service that enables librarians and library patrons to find community experts willing to answer particular questions in the area of their expertise.

In terms of a mutually beneficial arrangement, working with your local library is close to ideal: for the cost of the promotional materials, the library can offer its clients the expanded services described above; and your service is provided with a community-based outlet for promotional materials as well as a library staff willing to refer interested library patrons. In addition, your local library is a public space that may be available for many kinds of events and activities. Your library may be able to accommodate your participants as they get together for teaching and learning from one another.

COLLEGES AND UNIVERSITIES

Developing relationships with colleges and universities in your area may be another good way to promote your capacity listing and referral service. Both two-year and four-year educational institutions may be able to offer a number of possibilities for distributing information about your program:

• College or university libraries can be used in much the same manner as public libraries–as information distribution centers and the source of referrals for your participants.

• Colleges and universities generally have some sort of student union where information about local activities and events is distributed.

- Colleges and universities generally have special interest centers, for example, a women's center, whose director may be willing to include information about your service in their events schedule.

Depending upon the size of the institutions, and the extent to which you hope to develop mutually beneficial relationships with them, you may want to prepare focused publicity materials that will emphasize the ways in which college students can benefit from your service. College students, for example, may find your service especially useful for:

- Identifying experts in business, industry, government, and social agencies who are willing to provide personal knowledge and direction for students who are seeking to supplement printed resources when writing research papers.

- Finding outside tutors for difficult subjects.

- Locating fellow students and other persons who can benefit from their skills and knowledge through one-to-one tutoring arrangements.

- Pursuing educational interests in subjects not customarily offered by their college or university.

Establishing a relationship with a local college or university may also help you obtain permission to use some of their space. Public institutions especially, including community colleges, may be very willing to allow your participants to arrange for the use of classrooms or other facilities for their capacity-sharing meetings.

To initiate a relationship with a local college or university, you should contact directors of individual interest and activity centers, for example, the director of the student union, as well as the person in charge of student activities at the institutional level. Explain your service to these individuals, and ask what kinds of arrangements might be possible for the distribution of materials and for the use of space.

PARK DISTRICTS AND RECREATION CENTERS

Local park districts and recreation centers are already actively involved in providing some form of educational and recreational programs for community residents. They therefore represent an excellent opportunity for expanding the capabilities of your capacity listing and referral service. Depending on the size of the town or city in which you live, there may be hundreds of park district programs already in existence, so you will need to select from among those that are operating in parks in your immediate neighborhood.

Your capacity listing and referral service can benefit from developing relationships with local park districts through the expanded publicity network they may provide, as well as through the increased access to space for your participants to meet. In addition, the park districts themselves can find additional resource people to help conduct programs for their clients through your listing service.

As with colleges and universities, you will want to approach these programs in two different ways.

- First, ask the area parks district program director about distributing your materials through their system and about connecting with the parks in your neighborhood.

- Second, ask the director of the programs and facilities at your local park about the possibility of developing a mutually beneficial working arrangement.

PUBLIC SCHOOLS

Public schools are another local institution with which you can develop a relationship that will allow you to enhance the services you provide. On an informal basis, elementary and secondary school participants can benefit from participating in a capacity listing and referral service. School teachers can use the service to:

- Find resource people from the community to visit their classroom to demonstrate a skill or discuss a specialized area of knowledge.

- Find individual tutors for children having difficulty with coursework, or conduct tutoring groups during the summer months.

- Obtain fast answers to students' questions through the "telephone encyclopedia" aspect of the service. With one phone call to your service, teachers can be put in touch with your experts who may be willing to answer questions in their area of expertise over the telephone.

- Locate fellow teachers willing to discuss and share experiences, lesson plans, materials, and a variety of methods and techniques they have found to be effective in the classroom.

Public school students can use your service to:

- Obtain first-hand career information from people employed in their chosen field of interest.

- Find experts in the community willing to share specialized information for term papers and independent studies.

- Help other students who can benefit from peer tutoring outside the school situation.

- Teach other children and adults a skill or talent they have acquired.

- Form informal student groups for educational or recreational purposes.

Parents of public school students can use your service to:

- Find individual tutors for children if they are having difficulty with a particular subject.

- Locate people in the community willing to teach their children subjects that are not traditionally offered through the public schools.

- Share their skills, talents, and knowledge with both school children and other community residents.

- Design their own continuing education programs in accordance with their needs and time limitations.

- Form informal parent groups to share and discuss effective ways to raise children.

Of course your organization also benefits, both from the many capacity-sharing arrangements that can be generated through relationships with the public schools, but also through the expansion of your publicity network, and the increased access to meeting space that may result from such a connection.

LOCAL CHURCHES

The churches in your neighborhood may also be a wonderful resource as you develop your capacity listing and referral service. As we mentioned earlier, the congregation of a local church may be willing to loan you space in their facilities for several hours every week, and they represent a large group of people to whom you can immediately promote your program. Local congregations have the advantage of being a group of people who are already coming together on a regular basis, both for worship and for events and activities centered around the church community. By promoting your service through a church, you may find that your service generates a great deal of interest among people who already know one another but do not necessarily have a mechanism in place for introducing people to one another based on common interests. Promoting your service through a local church allows church members to:

- Expand their relationship networks to include people in the larger community.

- Enter into teaching and learning relationships with neighbors outside the congregation.

- Find individuals in the community who can bring in particular skills to church activities in the case where members of the congregation do not have expertise.

Your group will also benefit from the relationship in a number of ways. In addition to the possibility of using church facilities for your capacity listing and referral service, you will be able to:

- Promote your service among an entire church congregation, possibly including publicity information in a church newsletter.

- Expand the number of talented individuals on file to whom you can refer your registered members.

SMALL BUSINESSES

Your local community may have small businesses that will be willing to help you promote your capacity listing and referral service. Restaurants, book stores, record shops, craft stores, neighborhood banks, and a variety of other small business establishments can provide you with additional ways to deliver your message to the public. You'll find that many of the owners and managers of stores in your community are willing to let you place brochures on their counters and promotional posters in their windows.

When developing a distribution network for the dissemination of your promotional materials, it will be worthwhile for you to initially focus your energies on the stores in your immediate neighborhood where you can expect to find a good reception for your service. One important thing to remember about developing relationships with local businesses is that they are fundamentally different from public institutions whose purpose is to provide services to local tax-paying residents. While businesses do provide services to local people, they do so on a for-profit basis, and your approach to them should take into account two special considerations related to their status:

- First, Saturdays are generally bad days to initiate contact with small businesses. For many small businesses, Saturday may be their busiest day and they won't be too happy about spending time with you at the expense of their customers.

- Second, regular follow-up with store proprietors is important. A telephone call, postcard, or personal visit thanking them for their assistance will help to solidify your relationship with them. After all, you are going to want to visit them periodically to restock their supply of brochures as well as put up new posters. The more conscientious you are about saying "thank you," the more receptive they will be to your future requests for their assistance.

We would also like to share some other hints about how to make the most out of the promotional opportunities offered by local small businesses.

- When you ask a store proprietor for permission to place brochures on the counter, suggest a specific counter location on which you'd like to put them. Generally, the best spot will be right next to the cash register because that is where most of the customer traffic will be. Of course you must respect the wishes of the business owner, but it doesn't hurt to ask for the location you would most like to have.

- When asking for permission to place a poster in the store window, suggest the front windows and choose a spot as close to eye-level as possible. This will mean that more people walking by on the street will actually take notice of your materials.

Although small businesses are different from other local institutions, most local store owners are anxious to develop good relationships with local residents as their business will benefit as a result. Store owners often take pride in being able to tell their customers about opportunities for community involvement and networking, so developing relationships with these individuals is a worthwhile expenditure of time.

WORD-OF-MOUTH ADVERTISING

It is likely that your most effective method for promoting your capacity listing and referral service will be through word-of-mouth advertising. As your organization successfully facilitates teaching, learning, and activity matches among residents of your neighborhood, a very encouraging development is likely to take place. People in your area will talk a lot more about your program to their friends and relatives. As a result, word-of-mouth advertising will attract new callers to your program. This kind of advertising represents the best and least expensive form of publicity for your organization.

The longer you are in operation, the more requests you are likely to receive from community groups, service organizations, and churches for speakers or program leaders from your capacity-matching service. Take advantage of these opportunities to promote more community connections. They are very effective ways to promote your service among large groups of people at once and to inform more people about your program.

OTHER POSSIBILITIES FOR YOUR PUBLICITY NETWORK

There are several other possibilities that you may want to consider as you plan your publicity network, but they may not be the most appropriate while you are just starting out or if you want to keep your operation small. If you think you want to grow into a large organization, you may want to consider these options, some of which we have noted in the Appendix.

CONCLUSION

Your basic communications task is to make the people in your service area aware of the services you are providing. Since you probably have a very small budget with which to accomplish this task, you should take full advantage of every available opportunity for free publicity. Put your own creative talents to work and try to locate volunteer assistance. Among the residents of your local community, you may be able to find someone who can help you devise a brief promotional message that will produce a great deal of impact. Your ultimate goal will be to:

• Grab the attention of people who are already bombarded by many other messages each day.

• Let them know what participation can mean for them.

• Let them know how simple it is to participate, and what kinds of registration or membership opportunities you can offer.

• Get them interested in becoming actively involved in your program.

If you are successful in devising such a message and if you utilize a series of suitably developed publicity outlets, you are well on your way to operating an effective, useful, and viable listing and referral service for the people in your community.

CHAPTER FIVE

FUNDRAISING

Thus far we have provided you with information about how to start and run a very small and informal capacity listing and referral service through the use of volunteers. In this chapter we discuss how a very small operation can generate the amount of money necessary for basic operating expenses, which consist primarily of supplies and the preparation of promotional materials. Additionally, we discuss some of the issues related to program expansion that will inevitably arise if your program is a successful one.

Small amounts of money can be generated informally as part of a voluntary membership program. The remainder of this chapter outlines the basics for developing an internal fundraising system–one that relies on participants for support–that can remain an important component of your long-term fundraising plan even if you decide to formalize and grow into a larger and more far-reaching organization.

INTERNAL FUNDRAISING

In the long run, your participants, the local people who directly benefit from your efforts, are the people to whom you should turn for some level of financial support. If they like what you do for them, then they should be willing to assume some of the responsibility for keeping your service available to the public. It is a good idea to begin with participant support, both because it is compatible with a small and informal program, and because, even if you eventually do try to obtain outside support for your service, most funders do not want your organization to become permanently dependent on their financial support.

There are a variety of ways that you might raise money from your participants. Each of the following ideas could be used independently or in some combination:

• Charge a mandatory registration fee.

• Establish a voluntary membership program in which participants pay to become a "member" rather than just a "registered user."

• Charge a set fee each time a participant uses the service.

• Charge a fee for each subject registered.

• Charge teachers a percentage of their teaching fee.

• Create some other arrangement that might make sense for your operation.

The original Learning Exchange decided that the voluntary membership program was the appropriate option for its service. It decided that each of the other options would have created the need for an expanded staff in order to manage accounting and billing, and were therefore unfeasible. In addition, the founders were committed to keeping the listing and referral services free to anyone who was interested in developing new relationships within the community, and so did not want to force people to pay for participation.

If you decide to establish a voluntary membership program as your principal means of support, you will need to appeal to your participants' sense of general appreciation for the service you are providing, as well as provide them with some additional benefits in exchange for their annual membership fee. These additional benefits might include such things as:

• A copy of a listing of the subjects that participants are interested in teaching, learning, or finding a partner for.

• A subscription to a quarterly newsletter your volunteers can develop. An interesting newsletter can include articles describing what people are doing through the service, and a "Members' Bulletin Board" that can be used to inform fellow members of their needs, offerings, and interests.

• Any other creative item you can design that will both promote your program and make members more enthusiastic about their participation.

It is also a good idea to offer several levels of membership, designed to appeal to people in your community with different levels of needs and different levels of resources:

• Regular Membership, for people who expect to use your capacity listing and referral service as individuals.

• Family Membership, for families in which several members may want to use your services.

• Limited Income Membership, for senior citizens and other persons who wish to use and help support your program but who cannot afford the cost of your Regular Membership.

• Special Membership, for individuals or families who can afford to and desire to support your program with a larger financial contribution.

The Regular Membership and the Limited Income Membership categories allow you to offer a supportive role to community members of all resource levels. The Special Membership category allows you to make the most of the willingness of local people to support your valuable service. The Learning Exchange learned that many people are so enthusiastic about the service that they are willing to pay the higher amount for the satisfaction they gain from giving their support to such a program.

MOTIVATING NEW CALLERS TO BECOME MEMBERS

If you are going to try to support your capacity listing and referral service through voluntary memberships, it will be important to convince people during their initial contact with your organization to join it. Earlier in this guide, we described the registration process, and how to keep records of the people calling to become participants in your program. In order to motivate these new callers to become members, as opposed to registered users, you may want to try this three-stage approach for increasing the likelihood of their deciding to support the program:

• Develop an informative and helpful initial telephone conversation.

• Prepare a telephone follow-up consisting of a mailing of printed informational materials.

• Another follow-up mailing or telephone call scheduled for two weeks after the first mailing.

When new callers first contact your service they usually want to know how the service works and how they can use it. Please note that your initial introduction to the service should include not only a brief but accurate description of how the program operates, but also information on how the program is financed and how client support is needed. Some emphasis should be placed on the fact that people who opt for a membership receive a few extra benefits for their financial contribution.

While the objective of the initial phone conversation is to get new callers more *interested* in your program, the primary objective of the printed solicitation materials is to get them to *act*. The action you are hoping for is that they decide to become either a member or a registered user. We recommend that your packet of printed informational materials should consist of at least these three parts:

• An informational letter signed by your voluntary director.

• A descriptive brochure that outlines the general benefits of participation and the additional benefits of membership.

• A membership and registration application form.

The letter you send should be designed to reinforce the information provided in the initial telephone conversation. In general, you should be sure that your letter:

• Thanks new callers for their interest in the program.

• Defines the service, conveying the scope of the program in regard to the variety of subjects listed and the number of people participating.

• Underscores the need for support, and outlines the benefits available to members.

- Prompts them to act by encouraging them to complete the membership and registration application form.

The brochure you create should generally provide the same information, but in a format that the recipient will want to keep as a permanent resource:

- It should be designed to have eye-catching illustrations and text.

- It should be expressive and should illustrate some of the kinds of subjects and activities that attract people to listing and referral services.

The membership and registration application form is the new callers' action instrument. It is their passport for participating in your listing and referral service, so it should capture everything that is necessary for your volunteer to complete or confirm (in the case of a previous telephone contact) the information on the Master Card.

The membership and registration form also provides one more opportunity to "sell" the membership program. Please note that the membership benefits should be listed on all three printed items: the letter, the brochure, and the membership and registration form. In order to encourage more people to become supporting members, you may also want to de-emphasize the free registration option on the card by having it in smaller print.

If you have the resources to do so, you may want to consider including a self-addressed stamped envelope with the packet. This will make it easier for people to become members, but also represents an additional expense.

The follow-up mailing is not absolutely necessary, but it does represent another opportunity to interest callers who did not respond to the informational materials within two weeks of their first phone call to your service. The follow-up packet can be identical to the first or, if you prefer, you can simply telephone the interested individual to ask if he or she is interested in participating. The second contact, whether via a mailing or over the telephone, serves as a reminder to callers that your organization is still interested in having them participate in the program and it nudges them, once again, to become members.

GENERAL FUNDRAISING CONSIDERATIONS FOR EXPANSION

Your capacity listing and referral service and your financial needs may grow quite naturally as a result of the valuable nature of the service you are providing. Be sure to monitor the growth of your program so neither your financial requirements nor your need for volunteers grow faster than you can manage. If your program is successful, you will eventually have to decide how much growth your program can handle. If you do decide to explore growing into a larger organization, there are several things you should consider. Before developing a comprehensive fundraising strategy, your organization will want to give some thought to two critical questions.

- First, should your organization remain independent or a part of a larger, more established institution, for example, a library or community college?

- Second, how do you want your organization supported after the first few years of operation? Would you prefer to continue relying upon the users of your service for support? Would it be better to rely on a government grant, a broad-based network of corporations and foundations, or on some combination of funding arrangements?

Your answer to the first question, quite obviously, will have far-reaching implications for your organization. If you become part of a larger institution, your job of fundraising will probably be easier since funders more readily invest their contribution dollars in established institutions rather than new organizations. To funders, the former represents stability in that long-standing institutions already have a proven track record; the latter represents high risk, in that statistics show the failure rate for new organizations is quite high. Generally, funders will approach their contribution programs in a conservative manner, going with the surest and safest investment opportunity. However, along with the benefits of institutional sponsorship, you must also accept some loss of autonomy and independence and the risk of budget cuts.

Your answer to the second question will also have some profound implications for your organization. You may want to follow the example of the original Learning Exchange and develop a diversified, broad-based means of support for your organization so you can avoid the vulnerability of having only one funding source. Through your voluntary membership program, a large proportion of your costs can be covered by participants. You may want to try to raise some additional support through grants and contributions from local area foundations, corporations, and individual philanthropists. One idea, for example, is to offer yet another category of membership at the Sponsorship level. This kind of membership can be offered to local corporations at a much higher fee than your other membership levels and would allow employees of the organization to participate. For special projects like computerization, you may want to look for funds from governmental agencies or from computer companies who support neighborhood development at the local level.

Growing into a larger organization will require that you formalize your operations in some way. We encourage you to examine the Appendix for some suggestions for how you may want to proceed.**

CHAPTER SIX

PROGRAM MANAGEMENT

In order to create a successful capacity listing and referral service, it is imperative that you find a sensible way to orchestrate your volunteers, resources, and activities. One reason volunteer-based programs fail is because they become too dependent on the efforts, ideas, and energy of too few people. When these people decide to move on, the program may fall apart because not enough attention was given to the development of an effective management system that can carry the organization through the inevitable ups and downs of volunteer participation. This chapter will describe some ways that you can avoid major difficulties by developing a simple system for the administration of your program.

ADMINISTRATION OF YOUR PROGRAM

Because this guide is designed to help you develop a small, informal capacity listing and referral service, we will not recommend a highly sophisticated administrative structure. Essentially what you need is an effective way to manage your volunteers and your other resources without overburdening any one individual, and without ignoring the fact that the people will eventually move on. Therefore, although you may eventually want to consider having an Executive Director, an Advisory Board, and an Operations Director, we will assume that your service is small and that you can dispense with these positions until you decide to develop your service into something bigger.

Your initial concern will be to make sure you have a sufficient number of well-trained volunteers to conduct the necessary tasks of operating your capacity listing and referral service. Chapter Two outlined the basic tasks associated with getting your program up and running:

- Designing a "Game Plan" for your service.

- Choosing a name for your organization.

- Finding a base of operation.

- Getting a telephone installed.

Chapter Three outlined the basic tasks associated with developing and effectively using your information systems:

- Taking information from individuals who call to register or list themselves as willing to teach, learn, or become involved in an activity.

- Completing the Master Cards, Teacher Cards, Learner Cards, Interest Match Cards, and Feedback Cards.

- Maintaining a filing system for each of the cards in the record-keeping system.

- Providing referrals to individuals who express interest in a particular kind of match.

- Following up on referrals made.

In addition to these basic tasks of operation, however, you will need to incorporate at least one additional administrative device into your management structure. The primary requirement will be a weekly or biweekly meeting of all volunteers. At this meeting you can accomplish some of the necessary tasks associated with the operation of your service as well as team building among your volunteers:

- You can make out the volunteer schedule for the upcoming week, including time for answering your telephones and making match referrals, for responding to membership and registration requests, for filing, and for doing mailings or other promotional work.

- You can discuss any organizational problems that may emerge and devise appropriate solutions.

- You can converse as a team in order to reinforce team membership and enthusiasm, and to provide volunteers the opportunity to communicate their own needs in the context of their volunteer participation.

You will also probably want to assign one volunteer the role of director, so that you have a point person who can organize meetings and distribute information among your volunteer team. This can be a rotating position, or you can assign an individual on a semi-permanent basis, but remember that you do not want people to feel overburdened by the amount of work they are doing on a volunteer basis.

Another very important thing you can do to ensure the future of your organization is to document the systems you develop for the operation of your program and train as many people as possible in their use. So, for example, by preparing simple training manuals and instruction sheets for the basic tasks involved, you can save time and energy if any of your volunteers are unavailable to carry out their scheduled tasks. And if you have trained extra volunteers in the basic tasks, adjustments of this kind will be much easier to accommodate. Finally, if one of your volunteers leaves your program, fitting a new volunteer into the schedule will be much easier if the person has been trained beforehand, and if you have printed instructional materials to which that person can refer.

One of your main management objectives should be to avoid letting your program become dependent upon the personalities and personal knowledge of just a few volunteers. By distributing knowledge, techniques, and know-how widely among your volunteers, you will develop the best guarantee that your program will endure.

CONCLUSION

The time and effort you put into assembling an active and dedicated team of volunteers, and making sure that the tasks you expect of them are clear, reasonable, and not excessive, will have a direct payoff for your organization not only in terms of stability but also in terms of the quality of service your participants can expect from your program.

APPENDIX A - ADDITIONAL INFORMATION

CONSIDERATIONS FOR ESTABLISHMENT OF A LEGAL ENTITY

If you are interested in establishing a legal entity, which may be a good idea if your information exchange is intended to be a large, comprehensive organization, there are a number of issues you should consider and explore. In order to become a legal entity, you'll have to file an incorporation application with your state. Contact the state office in your area to obtain the necessary forms and instructions for becoming a not-for-profit corporation. You will probably need the assistance of a lawyer to complete these forms. You will also need to file for tax-exempt status with the federal government, for which you will need to contact the Internal Revenue Service in your city. These steps can take several months to complete, so be sure to leave yourself a sufficient amount of time to get them done prior to your start date. If you are planning to become a part of an existing organization, you will need to discuss the relevant legal issues with that organization's attorneys.

MORE COMPLICATED INFORMATION SYSTEMS

If you want to expand to a more complicated information system than the one presented in this guide, it will be important to examine a number of computer programs in order to discover which will best suit the needs of your organization. There are a number of programs that include a variety of data entry, data access, and data management options. You will want to select the package that allows you to control your data in such a way that only appropriate persons can view certain types of information, and one that allows easy access if you want to make the database available to your clients.

INSTITUTIONAL PARTNERS

You may want to consider partnering with a local institution and creating a Library Membership Program. If this sounds like a good option, you'll want to: 1) identify an influential, progressive person in your city's library system, possibly a system director or a library board member; 2) meet with this person and share your ideas for developing a cooperative working relationship; 3) develop a strategy for raising funds to help handle the front-end costs of designing and implementing the program; 4) print promotional materials that will eventually be distributed to library patrons; and 5) with the help of your library contact, design a strategy for informing library employees about the partnership and its services.

CORPORATE MEMBERSHIPS

It is also quite possible to establish a corporate membership program. This kind of program would: 1) extend the services of your listing and exchange service to employees and retirees of local area corporations; and 2) generate additional income for your program. Two techniques for attracting corporate employees are cost-effective: 1) lobby displays with "take-one" literature, and 2) the distribution of take-one literature through information packets customarily distributed to new employees. Although corporate employees tend to respond better when they actively

seek out information by voluntarily picking up a brochure from a lobby display, new employees are more likely to respond if they receive a brochure through in-house mail.

If you want to develop communication programs with corporations in your area, the key person for you to contact will be the Director of Public Affairs or the Director of Employee Relations. When you are negotiating with your corporate contacts about the communication program, you may want to ask that the company cover all or part of the printing bill as a donation to your organization.

OTHER WAYS OF ADVERTISING AND PROMOTING MEMBERSHIP

Public Transportation Systems: Almost all commuter trains, subways, and buses have advertising space available and the advertising departments of most regional transit authorities may provide public service space for not-for-profit agencies at a reduced rate. If you want to explore this approach, contact someone in the advertising department of your city's transit authority to determine how they might assist you in developing an effective transit advertising campaign.

APPENDIX B - FREQUENTLY ASKED QUESTIONS

Occasionally a new caller to your capacity listing and referral service might ask any one of the following three questions. We have listed possible responses to the questions directly below each one.

Q.   **How do you know your teachers are qualified?**

A.   We have no formal way of determining whether or not a person who has listed themselves as a Teacher is qualified. When teachers register with our service, we ask them at what level they can teach (beginning, intermediate, and advanced) and where and how they gained their expertise. We do not believe qualifications are an issue as the majority of participants are satisfied with the instruction they receive. Any small amount of dissatisfaction is usually the result of personality differences between Teachers and Learners, scheduling problems, incompatibility of teaching and learning styles, and difficulties with fee requests or travel.

We always give callers a number of people to choose from when they call for referrals if this is possible; if a person is actually dissatisfied, they can call for additional referrals. We ask people to call us back and let us know how things work out. If there is a serious question about a Teacher's level of ability, we call up the Teacher and check out the information we have on file. In the final analysis, we believe that the student is the best judge of the Teacher, not us. There are different styles of teaching for different people. What may not work for one student may be highly effective with another. It should also be kept in mind that you can stop meeting with a Teacher anytime you want. You don't pay a registration fee, unlike most colleges, universities, and schools. If you do enter into a contract with one of our listed Teachers it is your business and only by your choice.

Q.   **What do you do to protect your clients from weirdos, perverts, and people with illegal intentions?**

(We believe that the best way to respond to this question is to use a brief example like the following one.)

A.   We believe that problems of this sort are extremely *unlikely* to occur. The most severe problem we've had is in the area of witchcraft. At one time, we had a woman registered to teach witchcraft. Late one night someone called the Teacher and used crude language to hassle her about her "silly" belief in witchcraft. On the following day the witchcraft teacher called our service and asked that her cards be removed from the files.

In essence, what many skeptics expect to be a major problem, just hasn't materialized. Volunteers are not permitted to give the names and phone numbers of participants to someone who isn't registered. Moreover we never give out addresses unless the participant asks us to give

out this information. This procedure makes it necessary for participants to have telephone contact before arranging a face-to-face meeting. On the basis of the telephone conversation, the participants will then mutually decide whether or not they want to meet. Sometimes they'll first meet in a public place; build a trust level with one another; and then, if it is more convenient, they'll meet in one or another's home. Sometimes a participant will bring along a friend or relative just as a precautionary measure.

Q.   If harm comes to one of your participants as a result of connections they made through the listing and referral service, to what extent will you be held liable?

A.   This is a matter we have discussed with several attorneys and their professional opinions were identical. Due to the nature of the service (listing willing participants and referring them to one another so they can assume the responsibility of creating their own teaching/learning/ sharing arrangements), the only circumstance under which we might be held liable is a case of negligence on our part. Negligence could be defined as "doing something other than that which we purport to do" or "purporting to do something which we cannot do." This organization purports to be a listing and referral service whereby people who have registered with the service can be referred to others who have listed themselves for subjects, and/or they can list themselves for subjects so that others can be referred to them. Examples of negligence might include: giving out information about a client to a caller who is not registered; giving out information about a client who is not listed for a subject requested by a caller; or guaranteeing a caller that he/she can obtain a degree or job by using the Teacher referred by the service. In other words, as long as we only do what it says we will do, and do not claim to do what we cannot do, we should never be held liable on the basis of negligence.

APPENDIX C - CAPACITY LISTING EXAMPLES

These are examples of some of the listings from one capacity listing and referral service. These examples appear monthly in a newsletter the organization distributes to all of its members.

IN THE SWIM

A young woman who can help children and adults who are uneasy around water overcome their fear and learn to swim lists herself as a Teacher. She's a Red Cross certified Water Safety Instructor employed as a therapist at a treatment center for emotionally disturbed children. Her own swimming instructor trained under an Olympic coach; she uses his method along with Red Cross techniques, and combines them with her professional knowledge of psychology. This Teacher has access to a pool in the city, but will travel as far as 10 miles. She charges $10 a lesson, plus any pool fee.

SHOWS FOR SENIORS

He's a popular entertainer at senior citizens' centers and nursing homes in his neighborhood on the north side. The shows he puts on consist of humor, bits of philosophy, poetry, and songs that quickly fill an hour and are free of charge. A senior citizen himself, he sings in English, Hebrew, and Yiddish–the songs range from popular classics to religious music. He varies the performance to suit particular audiences. Some of his humor, he says, is a little "off-color," but the seniors love it. He is willing to travel throughout the metropolitan area if transportation is provided, and he requires a piano accompanist for his songs.

TACK DOWN A NEW SKILL

A master craftsman lists himself as an upholsterer who can custom design and build furniture, remodel old pieces, and make fragile antiques usable again. He is anxious to find an apprentice–someone who wants to learn the trade from the ground up with the goal of becoming a professional. He says there are no prerequisites except serious intent and real willingness to learn. However, if you only want advice about a pet project, such as redoing a favorite chair or custom-finishing a van, he will give it free of charge. You may phone him or drop by the garage-workshop in back of his home.

RENT A HORSE

If you'd like to enjoy the out-of-doors on horseback this summer, call and find out how, for only $10, you may rent either of two horses or a pony for an afternoon's ride in a local forest area. The animals are family pets offered for rides because they need to get more exercise and the fee will help pay for their board. They are gentle–no experience is necessary to ride them. A corral is available if you want to practice before setting out for the trails.

ART THERAPY

A talented artist and certified art teacher lists herself as a Teacher who specializes in teaching arts and crafts to the physically and mentally handicapped. Her background includes teaching Art and Nature courses for an environmental association, crafts at a mental health center, painting and drawing at YMCAs, and basket weaving and print making at a local community college. She will travel to north and northwest suburbs. Her usual fee is $18 an hour, but she will exchange art lessons for help with her garden or household repairs.

RIDING THE RAILS

He's loved trains since childhood and, happily, now is employed as a Community Relations Coordinator with the local transit authority. As part of his job, he makes presentations to schools and civic groups about rail services and conducts tours of the system. Being blind, he is particularly aware of the many clues blind people can use in riding mass transit. He can explain, for example, how to identify rapid transit stops by sound.

A "NATURAL" CURE

A 72-year-old woman who attributes her "unbounded energy" and "nearly perfect health," after years of suffering from rheumatoid arthritis, to homeopathy, a healing method based on the use of herbs and minerals, lists herself as a Teacher. Homeopathic drugs, she explains, treat the causes of poor health as well as the symptoms; and they help cure "mental negativism," or depression, which is "a part of every illness." She offers advice free of charge on the uses of homeopathy or, in cases of serious illness, refers those interested to a licensed M.D. who uses the method.